

Project Management Checklist

The project management checklist below covers the most common project management tasks.

Tasks should be added and subtracted to match the complexity of your project and your project management methodology.

Business Case (document)

- Business Context
- Project Overview
- Project Alternatives
- Target Business Outcomes
- Value Proposition (e.g. ROI, net present value, payback period)
- Assumptions
- Constraints
- Risks
- Deliverables
- Requested Budget and Financial Schedule

Business Case Review (process)

- Identify Approvers
- Communicate Business Case
- Business Case Review Meeting
- Business Case Approva
- Financial Approvals

Feasibility Study (process)

- Conduct a Feasibility Study

Project Charter (document)

- Project Objectives
- Project Benefits
- Solution Constraints
- List of Stakeholders
- Project Organizational Chart
- Project Scope
- Out of Scope Items
- Phase Definitions and Initial Schedule
- Resource Requirements
- Initial Communication Plan
- High Level Risk Management Plan
- Spending Authority and Initial Budget

Project Charter Review (process)

- Identify Approvers
- Communicate Project Charter
- Project Kickoff Meeting
- Project Charter Approval

Initiation Phase Review (process)

- Perform Initiation Phase Review

Project Planning (process)

- Develop a Resource Plan
- Obtain Resource Approvals
- Set Up Project Office
- Develop Project Management Plan

Project Management Plan (document)

- Scope Management Plan
- Communication Plan
- Project Budget
- Risk Management Plan
- Quality Management Plan
- Procurement Plan
- Resource Management Plan
- Project Change Management Plan
- Financial Management Plan
- User Acceptance Plan
- Work Breakdown Structure
- Project Schedule (including milestones)

Planning Phase Review (process)

- Perform Planning Phase Review

Procurement (process)

- Develop RFI
- Communicate RFI
- Review Vendor Responses to RFI
- Develop RFP
- Communicate RFP
- Review Vendor Responses to RFP
- Select Vendors
- Negotiate Vendor Contracts

Execution Process (repeated process)

- Build Deliverables
- Manage Risk and Issues
- Control Budget
- Manage Project Cash Flow
- Update Project Plan
- Manage Communication
- Manage Risks
- Manage Project Team
- Manage Project Vendors
- Manage Quality
- Manage Change Management
- Manage User Acceptance

Execution Phase Review (process)

- Perform Execution Phase Review

Project Closure (process)

- Evaluate Project Performance
- Evaluate Individual Performance
- Perform Lessons Learned
- Perform Post Implementation Review
- Identify Outstanding Risks and Issues
- Handover Project Documentation To Customer
- Release Project Resources
- Finalize Vendor Contracts
- Develop Project Closure Report
- Communicate Project Closure

Business Controlling • Project Management

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